



Foreign Agricultural Service

**GAIN Report**

Global Agriculture Information Network

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GAIN Report #TU2039

## Turkey

## Grain and Feed

## Update

## 2002

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### Report Highlights:

**Turkey's wheat production and trade forecasts for the marketing year 2002 are revised slightly. Corn production and trade forecasts remain unchanged from the most recent update on July 31 (TU2032). Quality remains the greatest concern for the current wheat crop, and TMO has recently tendered to import wheat from the EU, Romania and Hungary.**

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Includes PSD changes: Yes  
Includes Trade Matrix: Yes  
Unscheduled Report  
Ankara [TU1], TU

Turkey's corn production and trade estimates were revised in GAIN Report TU2032 and remain unchanged at this time. The previous report reflected a significant increase in corn imports during the first half of 2002. During its harvest (and due to increased duties), Turkey is not expected to import corn in the coming months. Once the duty is lowered later this fall, Turkey is expected to import approximately one million tons of corn.

Turkey's wheat production for 2002 is estimated to be slightly lower at 17.5 million tons. Official estimates remain much higher. Most parties agree that quality remains a concern for Turkey. New seed varieties have not been developed or introduced in many years and the sunni pest problem continues to persist.

Turkey's MY 2001 import estimate was reduced slightly, and its export figure was increased slightly resulting in a lower ending-stock number. The export forecast for MY 2002 was lowered slightly and stocks are forecast to increase as a result.

One of the more interesting developments for this year's wheat marketing year is the procurement policy and its effects on imports. The Turkish Grain Board (TMO) has announced a series of procurement prices which have not attracted farmer interest. As a result, TMO has not been able to procure as much wheat as it would like. In response, TMO recently tendered to import wheat (duty free) under bilateral agreements with the EU and Black Sea countries. On Sept. 03, Turkey collected offers under a tender to import 140,000 tons from the EU, Hungary and Romania. (Maximum 100,000 from EU; 30,000 from Hungary and 10,000 from Romania.)

This policy won't change the level of marketing year imports - what has changed are the importers and the timing. Every year Turkey imports about 300,000 tons of relatively high quality wheat under this system. Last year, however, it was the private sector that was given permission to import, and the imports took place much later in the season.

PSD Table						
Country	Turkey					
Commodity	Wheat				(1000 HA)(1000 MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		06/2000		06/2001		06/2002
Area Harvested	8700	8700	8500	8500	8600	8600
Beginning Stocks	1580	1580	1745	1728	1128	828
Production	18000	18000	15500	16000	18500	17500
TOTAL Mkt. Yr. Imports	466	439	1000	800	500	800
Jul-Jun Imports	446	418	1000	800	500	800
Jul-Jun Import U.S.	28	40	0	50	0	50
TOTAL SUPPLY	20046	20019	18245	18528	20128	19128
TOTAL Mkt. Yr. Exports	1601	1591	500	700	1500	700
Jul-Jun Exports	1601	1579	500	700	1500	700
Feed Dom. Consumption	1000	1000	1200	1200	1000	1000
TOTAL Dom. Consumption	16700	16700	16617	17000	17100	17000
Ending Stocks	1745	1728	1128	828	1528	1428
TOTAL DISTRIBUTION	20046	20019	18245	18528	20128	19128

Export Trade Matrix			
Country	Turkey		
Commodity	Wheat		
Time period	6/01-3/02	Units:	'000 tons
Exports for:			1
U.S.	0	U.S.	
Others		Others	
Egypt	131		
Italy	131		
Algeria	57		
Kenya	26		
Portugal	26		
Tunisia	20		
Morocco	20		
Cuba	13		
Israel	12		
Georgia	11		
Total for Others	447		0
Others not Listed	36		
Grand Total	483		0

Import Trade Matrix			
Country	Turkey		
Commodity	Wheat		
Time period	6/01-3/02	Units:	'000 tons
Imports for:			1
U.S.	0	U.S.	
Others		Others	
Russia Federation	137		
Germany	127		
Argentina	45		
Kazakistan	43		
Australia	48		
Croatia	24		
Romania	23		
Canada	8		
Ukraine	7		
Hungary	4		
Total for Others	466		0
Others not Listed	0		
Grand Total	466		0